# FTW Step 10: Census Data for Replication Year & ongoing years

10/30/2024 1:04 pm CDT

- Primary Grid for census data – In the Census tab, verify that the Primary Grid is set to * ftw DB Census Collection (ce207db). This will automatically update from the conversion year if you used the standard conversion grid in the prior year. If you are using custom grids, you will need to update this manually. This is used by the Scrub task to map data appropriately. To update the Primary Grid to use for the Scrub:
    - Click the vertical ellipsis,
      
      , on the far right-hand side of the screen, and select 'Grid Manager'.
    - Under the drop-down list for 'Primary Grid', select the census grid to be used.
    - Save changes by clicking the 'Update' button and then 'Close'.
- For BOY valuations only:
    - Uses prior year-end data, except that you need to add Group designations (see last field on the standard census grid) if it is a CB or DB plan with Groups – When the plan year was created per Step 8 above, data processes have occurred to position prior year-end data to run a BOY valuation in the current year.
    - 'Participant Alerts' button – Click to review data.
    - 'Census data' -- From this "Former Employees with Benefits" tab, select participants to 'Add to Census'
        - Select active employees, whether or not they have entered the plan. Do not add current year hours and compensation and do not add new employees.
        - Do not select deferred or in-pay participants. They should remain in the 'Former Employees with Benefits' tab.
    - 'Former Employees with Benefits' tab
        - For each deferred or in-pay participant where benefits have been calculated, enter new or updated payment information. Click the vertical ellipsis next to their name, then click 'Edit Participant' to enter payment information (Date of Birth, DB Status, Gender, Payment amount, Payment start date, Form of payment, Frequency of payment, Certain period (if applicable), Percent payable to survivor (if J&S form)).
        - For any deferred vested participant where benefits have not been calculated do not complete any of the payment information, and they will be calculated similar to how active participants are calculated for accrued benefits and assumed payment form.
        - 'Former Employees - No Benefits' - For anyone completely paid out or non-vested, move them to this tab by clicking the vertical ellipsis using the checkboxes to select each of them and 'Make Inactive' under the 'Do With Selected' options. This will move the record to the 'Former Employees - No Benefits' tab. Do not 'Delete' their records.
    - After the BOY processes have been completed, complete the year-end process per the next step.
- For EOY valuations and year-end processing after a BOY valuation:
    - (Option A) Upload census file – Using the * ftw DB Primary Census Collection grid, create a file with anyone who has worked any portion of the year and save it to your desktop with current year data, then upload the file (click
      
      upload button > Browse > select file to upload > Next > select records to upload > Import > Done).
    - (Option B) Update census manually – For an EOY valuation, click the 'Participant Alerts' button to review participants brought forward from last year. For a BOY valuation, this has already been done during the BOY process.
        - For everyone who worked any portion of the year, click the box next to their name and 'Add to

Census'.
    - Next, click the tab labeled 'Back' to get to the Census screen.
    - Update each cell with current year data - compensation, hours, termination information, DB Status, etc.
    - Add new participants using the + button, then enter their data on-screen as well.
- Click the 'Participant Alerts' button if there are any remaining participants in this tab
    - First year in-pay and deferred vested participants – These should be in the census tab already, but if they are not, select them to be included in the census and add their census information so that compliance testing correctly takes them into account for the year.
    - 'Former Employees with Benefits' tab
        - For each deferred or in-pay participant where benefits have been calculated, enter new or updated payment information. Click the vertical ellipsis next to their name, then click 'Edit Participant' to enter payment information (Date of Birth, DB Status, Gender, Payment amount, Payment start date, Form of payment, Frequency of payment, Certain period (if applicable), Percent payable to survivor (if J&S form)).
        - For any deferred vested participant where benefits have not been calculated, do not complete the payment information, and they will be calculated similar to how active participants are calculated for accrued benefits and assumed payment form. Employees who worked in the current year should not be in this tab.
    - 'Former Employees - No Benefits' – For anyone completely paid out or non-vested, move them to this tab by clicking the vertical ellipsis using the checkboxes to select each of them and 'Make Inactive' under the 'Do With Selected' options. This will move the record to the 'Former Employees - No Benefits' tab. Do not 'Delete' their records. Employees who worked in the current year should not be in this tab.
- Add combo plan data (for ongoing years only) – Because compliance tests are not generally run in the Replication Year, combo plan data is not needed for a Replication Year; however, you will want to add this information if this is a First Processing Year, including for a startup plan.
    - Upload DC plan allocations into the DB Plan with information as of the end of the year, and prior to running your compliance tests. The DB system will be able to calculate PS allocations (but not other sources) if you prefer. See the Groups matrix in the Benefits & Liabilities task.
        - (Option A - from an existing ftw DC plan) Export the * ftw Contributions Upload (d043c55) grid from the DC plan, save it to your desktop, and upload it into the DB plan where combo testing will be performed.
        - (Option B - from any source) Enter the data directly into the * ftw Contributions Upload (d043c55) grid in the DB plan or Export the grid and save it to your desktop to enter allocations in the file, and then upload back into the DB plan.